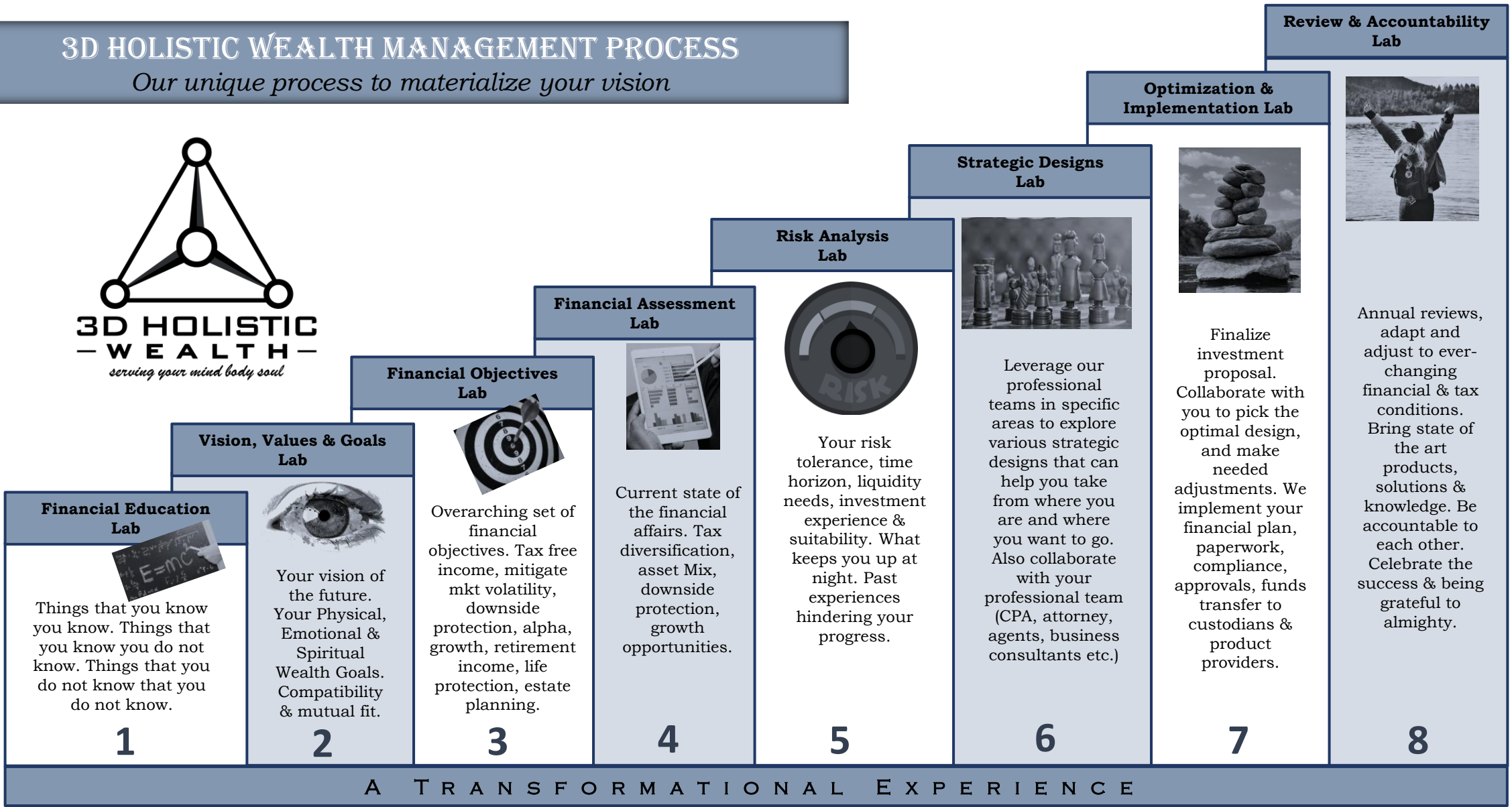


3D HOLISTIC WEALTH MANAGEMENT PROCESS

Our unique process to materialize your vision



Financial Education Lab

Things that you know you know. Things that you know you do not know. Things that you do not know that you do not know.

1

Vision, Values & Goals Lab

Your vision of the future. Your Physical, Emotional & Spiritual Wealth Goals. Compatibility & mutual fit.

2

Financial Objectives Lab

Overarching set of financial objectives. Tax free income, mitigate mkt volatility, downside protection, alpha, growth, retirement income, life protection, estate planning.

3

Financial Assessment Lab

Current state of the financial affairs. Tax diversification, asset Mix, downside protection, growth opportunities.

4

Risk Analysis Lab

Your risk tolerance, time horizon, liquidity needs, investment experience & suitability. What keeps you up at night. Past experiences hindering your progress.

5

Strategic Designs Lab

Leverage our professional teams in specific areas to explore various strategic designs that can help you take from where you are and where you want to go. Also collaborate with your professional team (CPA, attorney, agents, business consultants etc.)

6

Optimization & Implementation Lab

Finalize investment proposal. Collaborate with you to pick the optimal design, and make needed adjustments. We implement your financial plan, paperwork, compliance, approvals, funds transfer to custodians & product providers.

7

Review & Accountability Lab

Annual reviews, adapt and adjust to ever-changing financial & tax conditions. Bring state of the art products, solutions & knowledge. Be accountable to each other. Celebrate the success & being grateful to almighty.

8

A T R A N S F O R M A T I O N A L E X P E R I E N C E

Irvine, CA 92618 www.3dhWealth.com dgoyal@3dhWealth.com, Ph: 949-997-1101. CA insurance Lic # 4097048

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Clients go through some or all of these steps of the process depending on their individual needs and circumstances.